

Construction Partnering Facilitator Checklist

This checklist is designed to be used in conjunction with details and forms found in "Partnering 101"

Planning for the workshop

	Collect background information for the project, construction org and contractor (history, number of jobs together, PEP evaluations).
	Work with the Resident Engineer (RE) and contractor to determine the workshop details.
	Discuss the overall approach to partnering to ensure key project leaders are in agreement.
	Include other stakeholders as dictated by the project.
	Be sure designers, subcontractors, suppliers and stakeholders are invited to the workshop.
	If possible, drive through the project with the RE & contractor to understand the scope.
	Identify issues – relationship or technical – that need to be discussed at the workshop.
	Customize the workshop based on workshop models and team relationship. Coordinate with the RE and contractor to create the agenda, the draft charter and the escalation ladder.
	Confirm logistics of the workshop such as the date, duration, time, stakeholder list and location.

Facilitating the workshop

	Provide name tags or name tents and markers.
	Provide a handout for each participant that includes an agenda and a "Participant Feedback of Workshop Effectiveness" form.
	Provide a sign in sheet that includes contact information (name, company, address, phone, email).
	Provide the Class Sign-in Sheet for "Introduction to Partnering Part II" for ADOT employees.
	Provide flip charts, markers, projector, computer and other equipment as required.
	Introduce yourself and describe your role. Ask participants to introduce themselves and discuss their role in the project.
	Have an ADOT representative give a brief overview of the project.
	Have a contractor's representative give an overview of the schedule.
	Present the history of partnering if appropriate for the project team.
	Explain the purpose and benefits of partnering.
	Assist the project team in creating a Partnering Charter that includes a mission statement (use the draft as a starting point) and project/team goals that all members agree with. Assist in creating team guidelines if applicable.
	Discuss the issue resolution process and importance.
	Create an Issue Escalation Ladder using the draft as a starting point.
	Explain the role and responsibilities of the Partnering Champions. Be sure they know it is their responsibility to enter the sub-goals into the PEP database for this project.
	Identify the Partnering Champions.
	Explain the Partnering Evaluation Program (PEP).
	Identify sub-goals for the five standard PEP goals. Add additional goals if the team desires.
	Identify and instruct the team on specific ways to use PEP and the reports available.
	Develop agreements for the timing of regular evaluations.
	Ensure that project leaders agree to take action and provide recognition when indicated by PEP reports.
	Facilitate a discussion of issues, record the discussion and create an Action Plan.
	Review specific assignments generated during the workshop and check for team member's commitment.
	Ask for closing comments from team members and from project leaders.
	Collect completed "Participant Feedback of Workshop Effectiveness" forms.

Post Workshop requirements

	Complete a customized Partnering Workshop Report.
	Send the "Facilitator Performance Evaluation" form to the RE and contractor project manager
	Send the report to all members of the project team within 3 working days. If this is not possible, send the Action Plan within 24 hours and follow up with the report as soon as possible.
	Return the ADOT Class Sign-in sheet to ITD Tech at: HRDCTraining@azdot.gov .
	Send the Workshop Report, completed "FACILITATOR FEEDBACK ON PARTNERING WORKSHOP" form and names and email addresses of the Partnering Champions for the project to: partneringinfo@azdot.gov .
	Provide follow up, additional consultation, or facilitation during the project if requested by CCP.